

idealware



Do You Need a New Donor Management System?

A STEP-BY-STEP DECISION-MAKING WORKBOOK

February 2010

WELCOME!

Without an effective system to track donors and other constituents, you can spend too much time just trying to figure out who to contact and miss out on many fundraising opportunities.

Most organizations have some kind of database to track all the different kinds of people they work with, but is it the right one? Maybe you've had doubts about your current system for a while, but were reluctant to change. Don't be—just because your organization has been using it for years doesn't mean it's right for you.

But switching to a new system can be a difficult choice—often, you've come to know the weaknesses and quirks of your current system, and the other systems seem shiny and full-featured in comparison. It can also be time-consuming, and sometimes costly, to evaluate new systems, to move data from one system to another, and to allow staff time to learn the new system. It's not something to do on a whim, or in an effort to find a mythical “perfect system.”

So how do you know if you should switch, or stick with what you have? This workbook will walk you through the process of assessing your needs, comparing them to what you have, and determining the benefits—and the costs—of moving. It doesn't include everything you'll need to assess your needs and pick a new system – instead, it concentrates just on the title question: Do you need a new donor management system?

Through the course of the workbook, you'll think through where you're going with your donor management strategy, and then what you need and what you have in terms of donor management features. You'll then consider your needs a little more broadly – how integrated should your system be with online features? Should it track constituents other than donors? You'll look at your system's ease of use, and how your training, support, and process can impact that. You'll then wrap up by talking with your vendor or a consultant to confirm that your system really doesn't do the things you think it can't, and then make your final decision.

Ready to get started? Dive in!

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#1 DO YOU NEED THIS WORKBOOK?

Before you invest the time to complete this workbook, make sure it makes sense for you. It's not designed to help you decide which specific system to move to—although it can help you start your thought process—but whether you should change systems at all.

Do any of the following apply to you?

- ☐ We're tracking our donation data in Excel.
- ☐ The donor management system we use has been discontinued by the vendor.
- ☐ We're tracking donations in FileMaker or Access, but don't know how to modify the system.

If you answered yes to any of these question, this workbook will only be of limited use. You definitely need a new system, so don't need a workbook to figure that out! This workbook might help you to begin to define your needs, but you'll need to go well beyond it to actually choose the right system for your organization.

What about any of these?

- ☐ We're pretty happy with our system, but we want to make sure it's the perfect one for us.
- ☐ We want to make sure we're staying on top of new technologies.

If you're relatively happy, it almost certainly makes sense to stay with the system you have – meaning it may not be worth your time to go through the process in this workbook. A new donor management system is a big commitment, and there's no such thing as a perfect system—it's usually a mistake to change systems in pursuit of something only slightly better than you have now.

If you didn't check any of the above boxes, you may well have lingering doubts about your system. Are you paying too much, or getting too little from it? Does it effectively support the tasks you need to accomplish? Forge onward to decide if you need a new donor management system...

#2 WHERE ARE YOU, AND WHERE ARE YOU GOING?

Donor management systems need to be capable not only of supporting your current fundraising processes, but the processes you'll develop as your organization grows and adds new strategies. Use this worksheet to think through how you are currently using your donor management system, and what you might need as your strategies evolve over the next two years.

Where are you now?

List your top fundraising priorities or activities for the current fiscal year (for instance, direct mail, email campaigns, capital campaigns, special events, membership drives, or friend-to-friend fundraising).

1. _____
2. _____
3. _____
4. _____
5. _____

What are the top 10 things you need your donor management system to do to support these priorities (for instance, what data do you need to track? What reports do you need to create?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Where are you going?

Try to think at least two years down the road for your organization, using your organization's strategic plan and fundraising plan to guide you...

What new major events or strategies will be essential to your fundraising (such as a new foundation program, a capital campaign or an anniversary gala)? In what areas will you grow—or shrink—your efforts? (Include only things you are reasonably sure will happen.)

1. _____
2. _____
3. _____

How will these changes affect how you manage your donors—if at all?

1. _____
2. _____
3. _____

List the top five additional things you will need your system to do, based on your new fundraising activities.

1. _____
2. _____
3. _____
4. _____
5. _____

Example

NEW STRATEGY:

Our nonprofit is planning to implement a corporate sponsorship campaign next year.

ADDITIONAL SYSTEM FUNCTIONS NEEDED:

1. Manage corporations differently from individuals
2. Track relationships between individuals and corporations
3. Record conversations between staff and donors
4. Mail merges with dollar figures based on past gifts
5. Store documents within donor records

#3 WHAT DONOR MANAGEMENT FEATURES DO YOU NEED?

As an organization, what level of donor management functionality do you need? Below we've provided a list of common features—it's not a complete list of all possible features, but will help you assess how complex your donor management needs are. Select the bubble that indicates how strongly you need your donor database to include each feature based on your strategic thinking in the last worksheet. This worksheet only includes specific donor management needs—for integrated online options (like email or payment processing) or features to track other kinds of constituents, see worksheets #5 and #6.

Consider carefully what's really a "must have"—that means you'd disqualify a system that's perfect in every other way just because it doesn't have that feature.

| BASIC FEATURES | DON'T NEED | NICE TO HAVE | VERY USEFUL | MUST HAVE |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Store contact info for donors/ prospects | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Add and view multiple donations per donor | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track relationships between donors/ prospects | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track different info for organizations and individuals | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access donor data over the internet | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Log communications between staff and donors | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Add custom fields to data forms | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Create mail-merged letters | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Create lists of donors based on gift or contact info | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Generate reports on past gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Batch data to post to accounting system | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| MID-RANGE FEATURES | DON'T NEED | NICE TO HAVE | VERY USEFUL | MUST HAVE |
| Track pledges, recurring, or future gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track soft credits, matching gifts, or split gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Enter a large number of gifts quickly | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track honorarium, memorial or tribute gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Easily group constituents into households | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Set a reminder to follow up with someone | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| | | | | |
|--|-----------------------|-------------------------|------------------------|-----------------------|
| Track progress on a grant proposal | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Set up different degrees of access for your staff | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Generate charts and graphs of donor data | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Flexibly place custom fields in an intuitive location | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Report on gifts based on source or campaign | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Import/export data automatically (i.e. via API) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ADVANCED FEATURES | DON'T NEED | NICE TO HAVE | VERY USEFUL | MUST HAVE |
| Tailor the interface to each user's particular needs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Support complicated gifts of stock | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Easily handle donor divorce | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Provide easily accessible wealth-tracking information | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Automatically flag good prospects using algorithms | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track gifts in a strictly financially auditable manner | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Save and easily access reports with custom parameters | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Create pipeline report forecasting upcoming gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| OTHER | DON'T NEED | NICE TO HAVE | VERY USEFUL | MUST HAVE |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Let's count up your answers...

Number of "Nice to Have" features: _____ X 1 = _____

Number of "Very Useful" Features: _____ X 2 = _____

Number of "Must Have" Features: _____ X 3 = _____

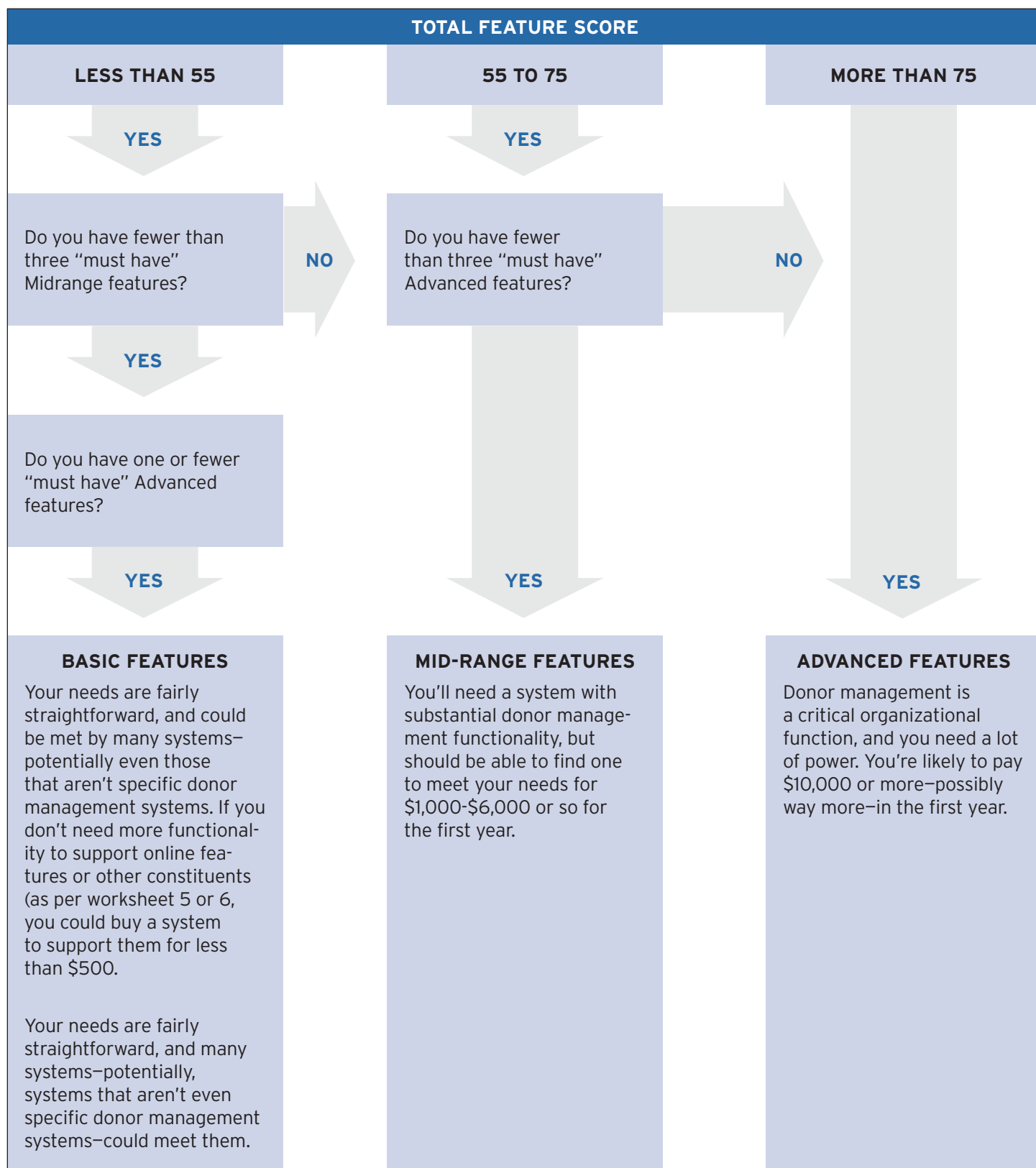
Total Score: _____

Number of "Must Have" Mid-Range features: _____

Number of "Must Have" Advanced features: _____

Number of "Other" features: _____

What do these scores mean? We'll assume you need at least basic donor management features, but do you need Mid-Range or Advanced Features? Which of the below describes you?



#4 WHAT DONOR MANAGEMENT FEATURES DO YOU HAVE?

So now that you've identified what you need, take a look at your current system and walk through the feature list to define what it does. You might want to look around your organization to see if there are other systems you're already using—like membership management, library management, case management or others—that might support donor management in addition to their primary function, especially if you fell into the Basic category for needs. You can fill out this worksheet more than once if you have multiple systems.

| BASIC FEATURES | DOESN'T DO | HANDLES A BIT | DOES PRETTY WELL | HANDLES GREAT | DON'T KNOW |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Store contact info for donors/ prospects | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Add and view multiple donations per donor | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track relationships between donors/ prospects | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track different info for organizations and individuals | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access donor data over the internet | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Log communications between staff and donors | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Add custom fields to data forms | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Create mail-merged letters | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Create lists of donors based on gift or contact info | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Generate reports on past gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Batch data to post to accounting system | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| MID-RANGE FEATURES | DOESN'T DO | HANDLES A BIT | DOES PRETTY WELL | HANDLES GREAT | DON'T KNOW |
| Track pledges, recurring, or future gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track soft credits, matching gifts, or split gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Enter a large number of gifts quickly | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track honorarium, memorial or tribute gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Easily group constituents into households | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Set a reminder to follow up with someone | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track progress on a grant proposal | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| | | | | | |
|--|-----------------------|-----------------------|-------------------------|-----------------------|-----------------------|
| Set up different degrees of access for your staff | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Generate charts and graphs of donor data | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Flexibly place custom fields in an intuitive location | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Report on gifts based on source or campaign | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Import/export data automatically (i.e. via API) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ADVANCED FEATURES | DOESN'T DO | HANDLES A BIT | DOES PRETTY WELL | HANDLES GREAT | DON'T KNOW |
| Tailor the interface to each user's particular needs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Support complicated gifts of stock | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Easily handle donor divorce | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Provide easily accessible wealth-tracking information | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Automatically flag good prospects using algorithms | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Track gifts in a strictly financially auditable manner | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Save and easily access reports with custom parameters | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Create pipeline report forecasting upcoming gifts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| OTHER | DOESN'T DO | HANDLES A BIT | DOES PRETTY WELL | HANDLES GREAT | DON'T KNOW |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

With that analysis under your belt, take a look at how your needs compare to what you already have. Do you need many more advanced features? Or does your current system do a lot more than you actually need, implying that you may have a system that's too big and too expensive for you?

If what you have is way out of line with what you need, you might have just answered the key question of this workbook, and you may need a new system.

Not quite that obvious? Take a minute to compare your needs to what you have and jot down your top six concerns based on comparing your current system to your needs.

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

#5 SHOULD YOU HAVE INTEGRATED ONLINE FEATURES?

Should you have a donor management system that integrates all your online transactions with your database? Almost everyone wants this, but in practice you'll likely need to pay more for it depending on what level of features you need, and especially if you need mid-level or advanced donor management features as well. Below we've laid out the needs that might cause you to prioritize integration, or lead you away from it—and the expense. For each online area, circle the segment that best describes your “must have” needs. (You can circle multiple needs for each area, if you like.)

| INTEGRATION MAY NOT BE WORTH IT | COMMON FEATURES THAT MANY SYSTEMS PROVIDE | INTEGRATION MAY BE PARTICULARLY USEFUL |
|---|---|--|
| BROADCAST EMAIL | | |
| You need careful graphic formatting with templates or branding You need to report how many and who opened or clicked | You need to send an email to everyone found through a query | You need the ability to merge donation data into email You need to synch email and donor data daily or more frequently |
| ONLINE PAYMENTS | | |
| You need specialized functionality for particular types of online payments—for instance, automatic corporate gift matching, event discount codes, or support for gifts that are only partially tax deductible | You need to take donations, event registration fees, membership dues online | You get multiple payments a day that need to be connected to a donor records You want to solicit offline gifts based on online actions, or vice versa |
| WEBSITE NEEDS | | |
| You need to support a complex site structure—for instance, with the same content appearing in multiple places on the site, or supporting multiple websites | You need to create simple forms which allow constituents to submit information into your donor management system | You need to easily give donors the ability to create website content (or blogs) You need to do sophisticated analysis of who donated based on what they do on the site |
| DONOR PORTAL AND FRIEND TO FRIEND FUNDRAISING | | |
| You need to support complex team structures for friend-to-friend fundraising | You need to manually log information about those who solicited and those who donated in a friend-to-friend campaign | You need to give donors access to change their own contact info or preferences online You need to synch data from friend-to-friend campaigns with your donor database more than once a week |

For any of these four areas, if you've circled the arrow with needs toward the "integration may be particularly useful" side, carefully consider the possibility that a more integrated system that includes both donor management and online features might be useful. This is especially true if you have only basic donor management needs, but integration might be useful — in that case, you might want to look at a system focused on online communication rather than donors.

On the flip side, if you've circled needs in the "integration may not be worth it" column, consider how important it is to actually have that feature integrated with your donor management system. If you need both sophisticated features for donor management and sophisticated ones for email, for instance, it might make more sense in the long run to simply use two separate systems.

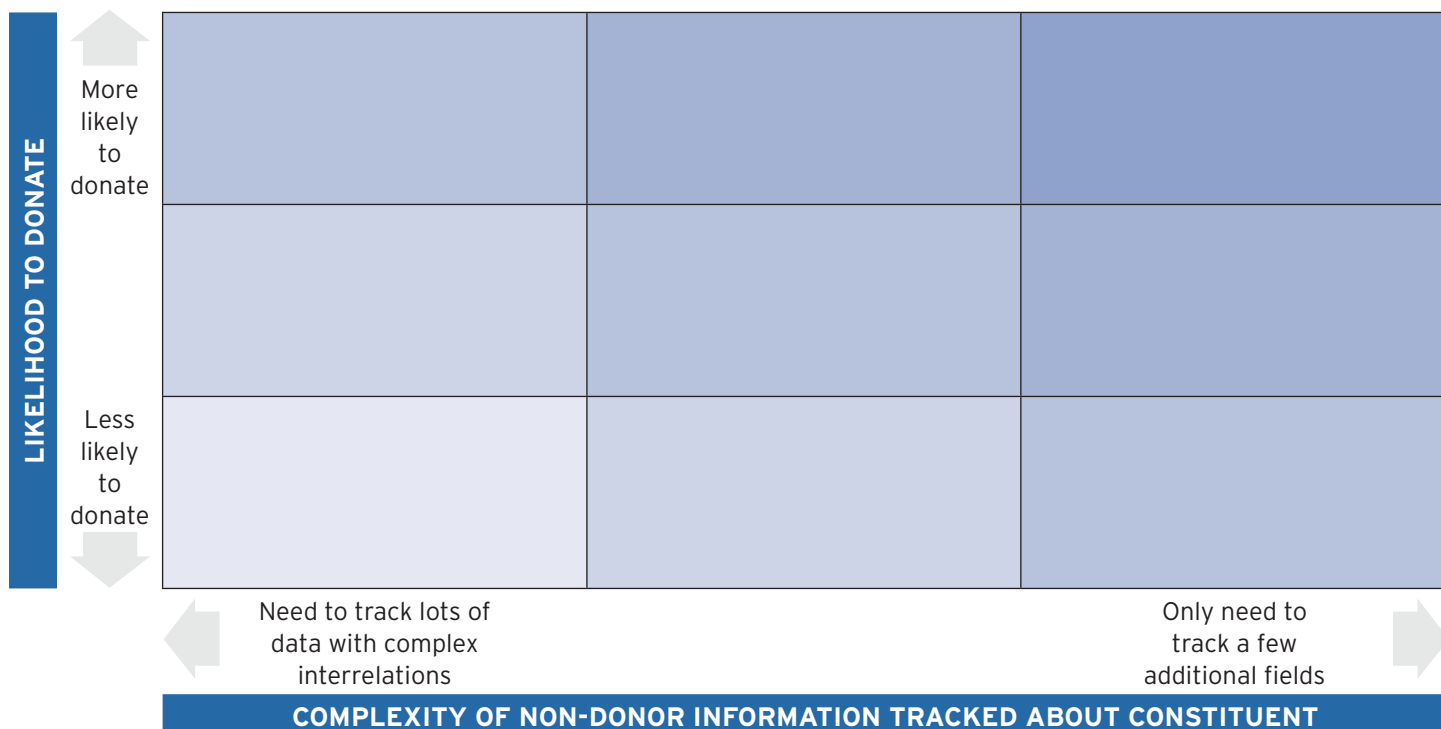
If you have both substantial donor management needs and online needs, or if you found yourself circling both ends of the arrow for some areas, you're likely going to need to look for a more powerful—and likely more expensive—system.

Now that you've identified what features would be highly useful to integrate with your system, which of these things does your current system do? Write down the four most important online features that your current system doesn't support.

1. _____
2. _____
3. _____
4. _____

#6 WHAT OTHER CONSTITUENTS DO YOU NEED TO TRACK?

You have constituents other than donors—perhaps clients, volunteers, press contacts or others. Should you track them in your donor management system? It's hard to decide. Start by identifying all the constituents you support (use the list at the bottom to help), and plot them where you think they belong on this matrix. Put them in the appropriate box based on how likely they are to donate, and how complex the (non-fundraising) data you need to track about them is.



| POSSIBLE TYPES OF CONSTITUENTS | | | |
|--|--|--|---|
| Activists Alumni Board members Card holders Case managers Class attendees Clients Contributors Gala attendees Event registrants | Families Friends Grantees Legislators Local businesses Members Newsletter readers Partners Past volunteers | Patrons People on your email list People on your mailing list People who purchase tickets Press Program Participants Prospects Resident experts | Service recipients Sponsors Staff Staff alumni Store patrons Students Vendors Visitors Volunteers |

The constituents on the top right of the matrix almost certainly should be tracked in your donor management system—they're relatively easy to track, and likely to donate. On the flip side, it may well make sense to use a separate system to track those who require complex data and are unlikely to donate. The hard decisions are for those in the middle shades of gray. Are they already being tracked in a system—and if so, is that process working? Would it make sense to only track some data about them, but not all of it? Have staff expressed interest in including them in your donor system?

Based on this analysis, what constituents do you think your current system should track that it doesn't? List the top six features that you wish you had to support them.

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

#7 HOW EASY IS YOUR SYSTEM TO USE?

Find out what other people in your organization think about your current system—send out an email to everyone who uses it. When you get the scores back, lay them out into the matrix below. Put each person’s score in the box that best corresponds to their relative level of experience with the system and the relative complexity of their tasks. When you have everyone’s score in, find the average score in each by adding all the scores in each box and dividing by the number of users in that box.

For example:

We’re in the process of thinking through whether our current donor management system is the right one for us. To help, can you respond to this email with your opinion on the usability of the system? On the following scale, how would you rate the usability overall?

1. I can almost never figure out how to do what I need.

2. I’m always having to take time to figure things out.

3. I can generally do what I need, but it often feels harder than it needs to be.

4. Most system tasks are generally straightforward.

5. The system works well for me.

As you think about the system, what tasks seem particularly hard to you? Thanks for your help!

| NOT MUCH EXPERIENCE WITH THE SYSTEM | | | | FAIR AMOUNT OF EXPERIENCE WITH THE SYSTEM | | | |
|---|----------|-----------------|--|---|-----------------|--|--|
| Only does fairly straight-forward tasks in the system | User | Usability Score | | User | Usability Score | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | Average: | | | Average: | | | |
| NOT MUCH EXPERIENCE WITH THE SYSTEM | | | | FAIR AMOUNT OF EXPERIENCE WITH THE SYSTEM | | | |
| Does more complex tasks in the system | User | Usability Score | | User | Usability Score | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | Average: | | | Average: | | | |

Take a look at your scores. Do some quadrants have scores of three or less? You can't really expect everyone to love the system, so it's not practical to expect to have solid fours or fives, but it's worth considering the implications of threes or lower. Does the system support one kind of person—like novices doing simple tasks—better than others, like experts who need to use the system day in and day out?

Based on the scores above, and people's comments in their emails, summarize the top four things you wish were easier to do in your system:

1. _____
2. _____
3. _____
4. _____

#8 HOW DO TRAINING, SUPPORT AND PROCESSES FIT IN?

Training, support, and defined business processes are essential to a healthy system and happy users. Often your staff will feel a system is hard to use because they haven't had adequate training, and don't know where to go for help. How can you tell when usability is a fault of the system, and when it is due to a lack of training and support?

Training and Support

Use this chart to think through the training and support options you have for your system—both what's available and how you and your staff are using this important part of system upkeep. Check all boxes that apply...

| | IS IT AVAILABLE? | | | ARE YOU USING IT? | | |
|------------------|---------------------|-------------------------------|---|-------------------------------|--|-------------------------------|
| | Through your vendor | A staff person can internally | Other help: friendly nonprofits, consultants, discussion groups, etc. | All staff have access to this | Staff are being encouraged to use this | Staff are actually using this |
| TRAINING | | | | | | |
| Written (Manual) | | | | | | |
| Online | | | | | | |
| In Person | | | | | | |
| SUPPORT | | | | | | |
| Online/Email | | | | | | |
| Phone | | | | | | |
| In Person | | | | | | |

Business Processes

Documenting your business processes—how you enter and manage information within your system—is essential to system cleanliness, functionality and usability. Thorough documentation and training on those processes ensures that everyone using your system is doing so in a uniform way.

Evaluate how your organization manages your business processes by checking all of the boxes that apply...

| PROCESS | THOUGHT ABOUT IT | COMMUNICATED IT | DOCUMENTED IT | TRAINED ON IT |
|--|------------------|-----------------|---------------|---------------|
| The minimum amount of information that should be entered for a donor or donation | | | | |
| The proper format for entering common info, like names and addresses | | | | |
| How soon donations should be entered after receiving them | | | | |
| How the system terminology maps to your organization's terminology (if mapping is necessary) | | | | |
| How to enter complex donations like matching gifts, stock gifts, or gifts with soft (aka recognition) credits. | | | | |

Is it your problem, or your system's?

If lots of people thought your system was not very usable and you don't offer much in the way of training, support or clear business processes, the problem may not lie in your system—think through how you can best support your staff in effectively using it. Is it worth hiring a consultant to help you document your own best practices and create training? You may want to reassess usability after providing training and some time to let it sink in. A new system with the same bad support and training you have now isn't likely to solve your problems.

#9 TALK TO YOUR VENDOR OR PARTNER

Through these worksheets, you've identified a number of things you wish your current system would handle better. But are you sure your system doesn't do them better than you think? Sometimes features are hard to find, available in a new version, or there's way to handle your needs in a different way.

So call your vendor! But wait? What if you're using a system (like an open source system) that doesn't have a vendor? See if you can find a consultant who knows the system well who can talk through your needs.

Start by prioritizing your top 10 system issues from the lists in worksheets 4, 5, 6 and 7, and enter them into the column on the left. Next, identify what you actually want to accomplish as opposed to the features you think you need. For instance, if you need a list of donors that gave as part of a particular campaign, that could potentially be handled by a search, a query or a report—think through your goal for each at the high level, and then enter it into the second column.

Finally, make a call to your vendor, tell them you're evaluating whether you should stay with their system or move to a new one, and ask them how you can achieve your goals. Write down what they have to say in the third column, and then your reaction to whether that will meet your needs in the last column.

| YOUR ISSUE | YOUR OVERALL GOAL | WHAT THE VENDOR SAYS | HOW WELL THE VENDOR'S SOLUTION MEETS YOUR NEEDS |
|--------------------------------|---|---|--|
| i.e. Can't search on addresses | Need to be able to find names and contact info for people who live in a particular Zip code | This can be built as a custom report, by Selecting the Zip code field, and enter any part of the Zip code | It works. It's a bit tedious to build the report each time as it can't be saved. |
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#10 MAKING YOUR DECISION

Now that you've put in all this work, do you in fact need a new donor management system? Take this final quiz to wrap it all up. Make sure to take into account any issues that turned out not to be issues after you spoke to your vendor.

- Based on worksheets 3 and 4, does your current system seem like it's at the right level for your donor management needs (Basic, Mid-Range, Advanced)?
A. Yes, seems about right (0 points)
B. It's a little bit too big or too small (1)
C. It's way too big or too small (2)
- According to the prices listed at the end of worksheet 3, do you seem to be paying about the right amount for your current system?
A. Yes, it seems good (0 points)
B. It seems too expensive (2)
C. It seems like we should spend more (2)
- Looking at worksheet 5, does your current system provide the online features that make sense to be integrated with your system?
A. Yes, we basically have what we need (0 points)
B. It would be very useful to have more functionality in one or two areas (1)
C. We need more functionality in three areas or more (2)
- Based on worksheet 6, does your current system provide the features you need to support constituents other than donors?
A. Yes, it supports the constituents we need to track (0 points)
B. It would very useful to track one or two other kinds of constituents it can't support (1)
C. We need to track a number of other kinds of constituents it can't support (2)
- Looking at worksheet 7, does your current system seem usable for your staff (assuming you've provided training and support, as per worksheet 8)?
A. Yes, staff seem to be able to use it reasonably effectively (0 points)
B. Usability issues are slowing us down (1)
C. Staff aren't able to figure out how to do what they need (2)

Now, tally your score by counting the point scores in parentheses after your answers, and interpret it on the following page.

| INTERPRETING YOUR SCORE | | |
|---|---|---|
| YOUR SCORE: 0-2 STAY WITH YOUR CURRENT SYSTEM | YOUR SCORE: 3-4 REPLY HAZY | YOUR SCORE: 5 - 10 LOOK FOR A NEW SYSTEM |
| You may be having a challenge here or there, but in general your system is working fairly well for you. There's no perfect system, and it's time-consuming to move. Stick with the system you have—congratulations on choosing a system that maps well to your needs! | You're one of the unlucky folks who are on the borderline. You have some significant concerns about your system, but moving systems is a big effort, and it's unclear whether it will pay off. Are there other factors that will help you decide? Are there cheaper options that might work better? Do you plan to expand your fundraising over the next year or two in ways that might affect your needs? Looking through the "For More Information" resources at the back of this workbook or spending some time demoing other systems might help you understand if there are likely to be better options for you. | There are a lot of things you'd like to be able to do that you can't—or, you're paying too much for a system that's too big. It's time to move on. Take your analysis and information from this workbook, consult the "For More Information" resources at the back of this workbook, and start a search for a system that will be a better fit. |

How does that feel? Does the recommendation seem right to you? Make sure you do a gut-check before relying on anything you've gotten out of a workbook. You know your situation better than any workbook can.

And best of luck on your donor management journey!

RESOURCES FOR MORE INFORMATION

A Consumers Guide to Low Cost Donor Management Systems (Idealware)

<http://www.idealware.org/reports/consumers-guide-low-cost-donor-management-systems>

An in-depth report looking at 34 different donor management systems that cost less than \$4000 per year, from March 2009.

Comparing Lower-Cost Online Integrated Applications (TechSoup/ Idealware)

http://www.idealware.org/articles/low_cost_integrated.php

A comparison of six different tools that provide online tools and constituent management functionality, from December 2007

Four Principles of Choosing Donor Management Software (Idealware)

<http://www.idealware.org/articles/four-principles-choosing-donor-management-software-0>

Keith Heller takes a look at the key things to keep in mind throughout the software selection process.

Donor Management Software Comparison (TechSoup)

<http://www.techsoup.org/learningcenter/databases/page5961.cfm>

A comparison chart of eleven different donor management tools, from May 2009

A Few Good Association Management Systems (TechSoup/ Idealware)

<http://www.techsoup.org/learningcenter/databases/page10975.cfm>

We summarize technology professionals' recommendations for their picks for association management systems, from November 2008.

Ten Common Mistakes in Selecting Donor Databases (And How to Avoid Them) (Idealware)

<http://www.idealware.org/articles/ten-common-mistakes-in-selecting-donor-databases.php>

A look at some of the ways you can go wrong (or right) in selecting a donor database from Robert Weiner

Robert Weiner's Donor Management Resources (Robert Weiner)

<http://www.rlweiner.com/resources>

A detailed list of other great resources about donor management systems

TechSoup's Technology for Fundraising Discussion Forum (TechSoup)

<http://www.techsoup.org/fb/index.cfm?fuseaction=forums.showSingleForum&forum=2022&cid=117&>

A discussion group where you can ask peers and experts your questions about donor management systems

ABOUT IDEALWARE

Idealware helps nonprofits make smart software decisions by synthesizing vast amounts of original research and information into thorough, approachable resources that make even the smallest organizations feel confident in taking the next step in their software selection process. We provide a trusted and authoritative online guide to nonprofit software including scrupulously researched in-depth reports, an online training library, and many articles and case studies—for free—through our website, www.idealware.org. We also partner with organizations to develop customized training and research to benefit entire networks of nonprofits.

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Laura has been working in the software sector for more than 15 years. As Idealware's Executive Director, she directs Idealware's research and writing to provide candid reports and articles about nonprofit software. Prior to Idealware, Laura founded Alder Consulting, where she helped nonprofits create Internet strategies, select appropriate software, and then build sophisticated websites on a limited budget. She has also selected software, designed interfaces and conducted user research for multi-million dollar software and website implementations with such companies as Accenture and iXL. Laura is a frequent speaker and writer on nonprofit technology topics.

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Andrea oversees Idealware's fundraising and training activities including the Field Guide to Nonprofit Software, sponsorship, corporate and individual giving, grants management and online seminars. Prior to joining Idealware, Andrea held fundraising positions in education, health research and museums and has taught math, performing arts and history in traditional and non-traditional educational settings. She brings a breadth of experience with fundraising software, particularly as it relates to small nonprofits, and has worked as a consultant with nonprofits across New England to help identify appropriate donor management software. Additionally, as a former teacher, Andrea brings front-line tested expertise in curriculum development and training.

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Chris is a longtime freelance writer. Prior to joining Idealware, he worked as a newspaper, magazine and public radio journalist and managing editor, as senior copywriter at an advertising agency, as a corporate marketing and communications specialist, and as a technical writer. He also wrote a travel book about biking in New England.

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